

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT			1. CONTRACT ID CODE	PAGE 1 OF 1 PAGES
2. AMENDMENT/MODIFICATION NO. 0005	3. EFFECTIVE DATE 1/4/2005	4. REQUISITION/PURCHASE REQ. NO. S-4-S3-41-41-B00 00	5. PROJECT NO. (If applicable)	
6. ISSUED BY Internal Revenue Service 6009 Oxon Hill Road, Suite 500 Oxon Hill, MD 20745 SANDY SHIN 202-283-1303/SANDY.SHIN@IRS.GOV		7. ADMINISTERED BY (If other than Item 6) See Item 6	CODE	
8. NAME AND ADDRESS OF CONTRACTOR (No. Street, county, State and ZIP: Code) TO ALL OFFERORS			(x)	9A. AMENDMENT OF SOLICITATION NO. TIRNO-05-R-00005
			X	9B. DATED (SEE ITEM 11) 12/14/2004
				10A. MODIFICATION OF CONTRACT/ORDER NO.
				10B. DATED (SEE ITEM 13)
CODE		FACILITY CODE		

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☒ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☒ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing Items 8 and 15, and returning 1 copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATA SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and data specified

12. ACCOUNTING AND APPROPRIATION DATA (If required)

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(x)	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER Specify type of modification and authority)

E. IMPORTANT: Contractor ☐ is not, ☐ is required to sign this document and return copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

This amendment revises the proposal due date AND time to January 18, 2005, at 10:00 am. This amendment also provides for other revisions to the solicitation document. Revised are: Addendum to 52.212-1, Instructions to Offerors-Commercial Items (pages 106 and 107) and Addendum to 52.212-2, Evaluation--Commercial Items (pages 112 and 113). Replacement pages are attached. The changes are identified by a change bar along the right hand margin of the attached pages.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
(Signature of person authorized to sign)		BY (Signature of Contracting Officer)	

SECTION IV, PROVISION 2

***ADDENDUM TO 52.212-1
INSTRUCTIONS TO OFFERORS -- COMMERCIAL ITEMS***

REPLACEMENT PAGES 106 AND 107

OUTLINE. The subcontracting plan must be accepted by the Government prior to award, and shall be made a part of any resulting contract.

C. REPRESENTATIONS AND CERTIFICATIONS

Offerors shall provide a completed Section V--Representations and Certifications as part of its price and business proposal.

VOLUME II/TECHNICAL AND PAST PERFORMANCE PROPOSAL

Proposal Volume II shall be submitted in accordance with the instructions set forth below. It should be prepared simply and economically, providing a straightforward, concise, delineation of the information provided to satisfy the requirements below.

(a) General.

Each Offeror's Technical Proposal portion of Volume II shall have a maximum number of 75 double-spaced pages that the Technical Evaluation Panel will evaluate (excluding the table of contents; the Section 508 EIT Accessibility Standards Evaluation Spreadsheet that offerors must complete; sample reports; exhibits; and copies of any Quick Reference Guides, Instructor Guides and User's Manuals currently in use to assist in training and/or day-to-day operations). An offeror proposing on both the online research and batch processing requirements may not exceed this combined page limitation. Pages beyond the maximum limit will not be evaluated. In addition, the Volume II pages shall follow the following formats:

(1) All pages shall be one-sided and 21.59 cm by 27.94 cm in size (i.e., 8 x 11 inches). Offerors may substitute fold out pages up to 27.94 cm by 43.18 cm (i.e., 11 x 17 inches). Each fold out page will be counted as two (2) pages. Magazine formatting (two columns per page) is not permissible.

(2) Top/bottom and left/right margins shall be no less than 2.54 cm (i.e., 1 inch).

(3) Each page font shall be no smaller than 12-point with standard proportional fonts (e.g., COURIER) for all text material. Offerors' may use captions no smaller than 6-point fonts; however, captions shall be appropriately used.

(4) Graphics. Each graphic page font shall be no smaller than 6-point.

In order that your technical proposal may be evaluated strictly on the merit of the material submitted, NO CONTRACTUAL COST INFORMATION IS TO BE INCLUDED IN THE TECHNICAL PROPOSAL. THE PROPOSAL SHALL NOT MERELY OFFER TO PERFORM WORK IN ACCORDANCE WITH THE SCOPE OF WORK, BUT SHALL OUTLINE THE ACTUAL WORK PROPOSED AS SPECIFICALLY AS PRACTICAL. The Statement of Work reflects the problems and objective of the program under consideration; therefore, repeating the scope of work without sufficient elaboration will not be acceptable.

(b) Format and Content of Volume II. At a minimum, the technical and past performance proposal volume shall consist of the following sections:

i. Implementation and Operational (I/O) Plan. The Offeror shall submit the synopsis of an I/O plan that describes how it intends to provide access via the Internet; the search methods used to provide data, and how these meet the needs of the public records service as required in the statement of work; the on-line Help feature of the proposed system that shall include screen facsimiles of the on-line Help features for at least 3 functions; the use of subcontractors; and compliance with mandatory requirements including the Section 508, section B 1194.22 and 1194.31 compliance (EIT Accessibility Standards Evaluation Spreadsheet must be completed). Offerors shall also identify clearly, but succinctly the major characteristics/features of all databases proposed as part of the online research package which includes both the general and law enforcement packages.

ii. Training Plan. The Offeror shall submit a Training Plan synopsis that describes its plan to provide training support services to satisfy the requirements of SOW section 6. The synopsis shall describe the management process and the credentials of the personnel to be assigned to facilitate and support the proposed training. The Offeror shall provide copies of any Quick Reference Guides, Instructor Guides and User's Manuals currently in use to assist in training and/or day-to-day operations.

iii. Management Plan. The Offeror shall provide a synopsis that describes its plan to perform/satisfy the requirements stated in the SOW and to demonstrate an understanding of the what controls would be instituted to ensure that required services are provided, management of subcontractors; how invoices would be processed to ensure that they reflect correct billings, how problems would be dealt with.

iv. Physical/Computer Security Plan. The Physical/Computer Security plan synopsis shall describe the Offeror's plan to address IRS security issues. The synopsis shall describe the controls of the proposed plan that would prevent unauthorized access to the database and the manner in which physical and computer security requirements will be met (in accordance with the minimum standards set forth in SOW Attachment E.1--PHYSICAL SECURITY REQUIREMENT and SOW Attachment E.2--COMPUTER SECURITY REQUIREMENT.

v. Description of Proposed Highly Desirable System Features. The Offeror shall provide descriptive information on any offered features that address/satisfy the Government's highly desired features set forth in the SOW.

vi. Temporary Account Access. Offerors shall provide eight (8) temporary account numbers and/or passwords. The IRS will access the vendor's product during the proposal evaluation phase to subjectively evaluate system ease of use and for validation purposes.

vii. Relevant Experience and Past Performance. The Offeror shall provide the information indicated in (1) through (7) below for each of its last five (5) agreements/contracts in chronological order by the beginning period-of-performance date for those that are completed or still in progress during the last three (3) years for the same or similar electronic locator/asset services as required in this solicitation.

SECTION IV, PROVISION 6

***ADDENDUM TO 52.212-2
EVALUATION -- COMMERCIAL ITEMS***

REPLACEMENT PAGES 112 AND 113

(iii) price.

Technical capability is more important than relevant experience and past performance; and relevant experience and past performance is more significant in importance than price. The price evaluation shall include a comparative evaluation of the individual CLIN prices as well as the total evaluated price from the pricing evaluation model.

(b) Options. The price evaluation shall be inclusive of the option prices. The Government may determine that an offer is unacceptable if the option prices are significantly unbalanced. Evaluation of options shall not obligate the Government to exercise the option(s).

(c) A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful offeror within the time for acceptance specified in the offer, shall result in a binding contract without further action by either party. Before the offer's specified expiration time, the Government may accept an offer (or part of an offer), whether or not there are negotiations after its receipt, unless a written notice of withdrawal is received before award.

(End of Provision)

6. *ADDENDUM TO 52.212-2-- EVALUATION -- COMMERCIAL ITEMS*

As stated in 52.212-2, entitled *Evaluation --Commercial Item (52.212-2)(JAN 1999)*, the factors that shall be used to evaluate the offerors technical capability, relevant experience and past performance, and price with award being made to the offeror or offerors who provide the best overall value to the Government. The offerors subcontracting plans will be reviewed for acceptability on a separate basis from technical capability, relevant experience and past performance, and price. Award will not be made to an offeror with an unacceptable subcontracting plan.

This addendum serves to further define both the evaluation process and the evaluation factors and subfactors. The Government intends to evaluate the batch processing separately and independently from the online research package, which could potentially result in two separate contract awards--one contract for the online research package and one for the batch processing. In the event that the same offeror is found to be most advantageous in all the evaluated areas, the Government will award a single contract for purposes of administrative efficiency.

I. The Evaluation Process

The evaluation process will include a preliminary review to determine whether offerors meet the mandatory requirements. If during this preliminary review, an offeror's product and services fail to meet all mandatory requirements identified in the SOW, the Government will deem the offer to be outside the competitive range. The Government will be under no obligation to evaluate any remaining portions of that offeror's technical or price/business proposal. Those whose proposals meet the mandatory requirements will proceed to evaluation phase one structured as follows. Phase one will consist of an

evaluation of the written technical and business/price proposals. The competitive range will be determined based on this evaluation. Phase two will consist of the oral presentation, OCD, and other discussions. The initial evaluation shall consist solely of a technical evaluation of the written proposal. The oral presentation and OCD will only be requested and evaluated from offerors within the competitive range. If during the technical evaluation an offeror's product and services fail to meet all mandatory requirements identified in the SOW, the Government will deem the offer to be outside the competitive range. The Government will be under no obligation to evaluate any remaining portions of that offeror's technical or price/business proposal.

Of those who are deemed to have met the mandatory requirements, the Government will proceed in a full evaluation of the technical proposal and the price/business proposal. Those offerors with the most highly rated proposals will be included in the competitive range for further discussions and oral presentations as described on page 109.

Upon completion of discussions and oral presentations, the OCD, and other discussions, the offerors may be afforded an opportunity to revise their offers submit a best and final offer (BAFO). The Government may incorporate various portions of the winning offeror's proposal into the resulting contract.

II. Evaluation Factors and Subfactors For Online Research

FACTOR 1: TECHNICAL CAPABILITY (86 Points for the Phase 1, Competitive Range Determination; 100 Points for the evaluation in Phase 2)

This factor shall be evaluated to determine whether the offeror's technical approach demonstrates an understanding of the contemplated effort as set forth in the SOW. The major subfactors under technical capability are identified below. It should be noted that in the oral presentations (subfactor 4) will not be requested or evaluated until after the competitive range is determined. Therefore, the maximum number of points for the Phase 1 technical capability factor for online research is 86 points). In Phase 2, an additional 14 points is allocated for subfactor 4, thereby increasing the maximum number of points to 100 for the online research evaluation of the batch processing requirement, subfactors 2 and 3 are not applicable and that subfactor 4 will not be evaluated until after the competitive range has been determined.

SUBFACTOR 1: DEMONSTRATED UNDERSTANDING OF THE SOW (36 Points).

The offerors will be evaluated on their understanding of the requirement and their ability to provide an integrated and credible approach to meeting the requirements. This major subfactor will be primarily evaluated through the synopses of the implementation & operation plan, training, management, and security plans. At a minimum, each plan will be reviewed as follows, however, the Government reserves the right to review all aspects of these synopses as they pertain to this subfactor:

Implementation & Operation (I/O) Plan. The I/O plan will be evaluated to determine:

